

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

## Program: PSA 33 - Kern County Aging and Adult Services HICAP

From: 07/01/2011 To: 06/30/2012

## Public and Media Data Report

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Type of Activity</b>					
<b>Interactive Presentations to Public in Person</b>					
Total Number of Events	46	35	47	44	172
Estimated Number of Attendees	1,429	847	1,437	1,885	5,598
Estimated Number of Persons Provided Enrollment Assistance	76	17	7	0	100
<b>Booths or Exhibits at Fairs or Special Events</b>					
Total Number of Events	3	1	0	2	6
Estimated Number of Attendees	2,475	250	0	450	3,175
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
<b>Mobile InfoVan Events</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
<b>Dedicated Enrollment Events</b>					
Total Number of Events	0	3	0	0	3
Estimated Number of Attendees	0	50	0	0	50
Estimated Number of Persons Received Any Enrollment Assistance	0	1	0	0	1
Enrollment Assistance with Medicare Programs(s)	0	0	0	0	0
Enrollment Assistance with Part D	0	1	0	0	1
Enrollment Assistance with LIS	0	0	0	0	0
Enrollment Assistance MSP	0	0	0	0	0
Enrollment Assistance with Other Medicare Program	0	0	0	0	0
<b>Radio Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
<b>TV/Cable Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
<b>Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)</b>					
Total Number of Activities	0	0	0	0	0
Estimated Number of Persons Reached	0	0	0	0	0

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<b>Other Print Activity (newspaper articles, fliers, phamplets, etc.)</b>					
Total Number of Print Activities	1	3	3	0	7
Estimated Number of Targeted Persons Reached	25	250	41	0	316
<b>Presenters</b>					
<b>HICAP Paid Staff</b>					
Total Presenters	49	42	50	45	186
Total Hours for Length of Activities	57.50	63.50	51.00	87.50	259.50
<b>HICAP In-Kind Paid Staff</b>					
Total Presenters	0	0	0	0	0
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	0.00
<b>HICAP Volunteer Staff</b>					
Total Presenters	1	0	0	1	2
Total Hours for Length of Activities	0.00	0.00	0.00	9.00	9.00
<b>Other Presenters</b>					
Total Presenters	0	0	0	0	0
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	0.00
<b>Area of Focus</b>					
Dual Eligible with Mental Illness	7	10	4	9	31
Employer Termination - COBRA	7	2	9	13	31
General HICAP Information	0	1	0	0	1
Grievances / Appeals - Plan Issues	41	37	42	42	162
Long-Term Care / Insurance	0	0	0	0	0
Low Income Subsidy (LIS) / Application Assistance	0	0	2	3	5
Medicare (Parts A & B)	31	30	32	35	128
Medicare Advantage (Part C)	27	27	33	39	126
Medicare Fraud / Abuse	14	19	15	28	76
Medicare Prescription Drug Coverage (Part D)	29	36	41	45	151
Medigap / Medicare Supplements	34	34	37	40	145
Non-Medicare Fraud/Abuse	7	13	10	20	50
Other Topics / Issues (Health Specific)	2	0	0	0	2
	3	2	2	0	7

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	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	0	0	1	0	1
Preventive Care Benefits	18	12	8	13	51
QMB/SLMB/QI	4	13	13	12	42
Volunteer Recruitment	1	1	2	0	4
<b>Targeted Audience</b>					
African American	12	10	12	17	51
American Indian or Native Alaskan	0	0	0	0	0
Asian Indian	0	0	1	1	2
Caucasian	30	35	32	30	127
Chinese	0	0	0	0	0
Disabled	25	28	26	19	98
Dual Eligible Groups	18	24	16	14	72
Employer Related Groups	0	1	0	1	2
Family Member/Caregiver of Beneficiary	11	3	14	20	48
Filipino	6	6	9	12	33
Guamanian or Chamorro	0	0	0	0	0
Hispanic / Latino	28	27	29	25	109
Hmong	0	0	0	0	0
Japanese	0	0	0	0	0
Korean	0	0	0	1	1
Low Income	37	37	31	31	136
Medicare Beneficiaries	33	34	30	34	131
Medicare Pre-Enrollees	13	2	12	14	41
Mental Health	6	4	1	4	15
Mental Health Professionals	1	0	1	1	3
Native Hawaiian	0	0	0	0	0
Other	0	0	0	0	0
Other Asian	2	1	5	6	14
Other Pacific Islander	0	1	0	1	2
Partnership Outreach	1	0	3	1	5
Presentations to Groups in Language Other than English	11	15	15	12	53
Rural	37	31	34	29	131
Samoan	0	0	0	0	0
Social Work Professionals	2	0	3	1	6
Some Other Race or Ethnicity	0	2	0	0	2
Vietnamese	0	0	0	0	0

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	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Web Site Hits</b>					
Total Web Hits to Local HICAP Web Site	0	0	0	0	0
<b>Literature from Events</b>					
General HICAP Brochure	1,671	783	900	1,714	5,068
"Taking Care of Tomorrow"	25	5	0	31	61
Other Publications (Created by or on Behalf of Local HICAP)	1,169	86	385	1,104	2,744
<b>Other Literature</b>					
Other Literature	0	0	0	0	0
Brochures from Quick Call	0	0	0	0	0

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

Program: PSA 33 - Kern County Aging and Adult Services HICAP

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## Client Contacts &amp; Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>SECTION 1 - Client Contacts</b>					
Total Clients Counseled (unduplicated)	594	760	635	357	2,346
Total Finalized Intakes	281	323	361	201	1,166
<b>How did client learn about SHIP/HICAP?</b>					
Agency (Social Security, Medi-Cal, etc.)	91	99	124	82	396
Aging into Medicare Postacd - CDA HICAP	16	5	4	4	29
CDA HICAP	3	0	3	1	7
CHA	1	0	0	0	1
CMS/Medicare	39	39	54	24	156
Friend/Relative	49	56	69	35	209
InfoVan	0	0	0	0	0
Internet	1	1	4	1	7
Mailings	1	5	1	4	11
Media	1	4	1	1	7
Other	30	36	27	19	112
Presentations	4	9	12	7	32
Previous Contacts	19	59	59	22	159
State Website	0	0	0	0	0
Missing/Not Collected	26	10	3	1	40
<b>Mode of Client Contact</b>					
Quick Call Contacts	394	501	336	186	1,417
Contacts by Telephone	560	644	552	303	2,059
Contacts In Person at home	5	9	2	2	18
Contacts In Person at site	186	236	334	148	904
Contacts by E-Mail	146	100	100	108	454
Contacts by Mail/Fax	176	236	238	139	789
Total Number of Client Contacts:	1,467	1,726	1,562	886	5,641
<b>Contact Status Types</b>					
General info	654	627	473	340	2,094
Detailed Assistance	626	839	1,061	618	3,144
Problem Solving/Resolution	70	168	168	132	538
<b>Total Counseling Time Spent by Counselor Type</b>					
Program Manager	64.40	63.55	49.55	50.05	227.55
Volunteer	1.00	0.00	1.45	0.00	2.45
Paid	380.22	457.49	546.32	308.37	1,692.40
In-Kind	0.00	0.00	0.00	0.00	0.00
<b>SECTION 2 - Client Demographics</b>					
<b>Ethnicity</b>					
(Hispanic/Latino)	99	75	95	51	320
<b>Race</b>					
African American/Black	26	14	23	11	74

From: 07/01/2011 To: 06/30/2012

## Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
American Indian/Alaskan Native	1	4	4	4	13
Caucasian/White	134	210	219	124	687
Native Hawaiian	0	0	0	0	0
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	0	0
Asian Indian	6	2	5	3	16
Chinese	0	0	0	0	0
Filipino	6	3	6	4	19
Japanese	0	0	0	0	0
Hmong	0	0	0	0	0
Korean	1	1	0	1	3
Vietnamese	0	0	1	0	1
Other Pacific Islander	0	0	0	0	0
Other Asian	1	3	1	1	6
Two or More Race	30	33	42	13	118
Some Other race	33	35	55	39	162
Not Collected	43	18	5	1	67
<b>Gender</b>					
Female	162	191	229	121	703
Male	119	131	132	80	462
Not Collected	0	1	0	0	1
<b>Monthly Income</b>					
Less than 150% of FPL	148	179	190	115	632
Equal To/Greater than 150% of FPL	96	120	166	80	462
Not collected	37	24	5	6	72
<b>Client Asset Limits</b>					
Below LIS Asset limit	35	37	48	19	139
At or Above LIS Asset Limit	22	17	19	3	61
Not Collected	224	269	294	179	966

From: 07/01/2011 To: 06/30/2012

## Client Contacts & Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Total Clients that Checked Yes as Being</b>					
Veteran	14	28	30	12	84
Limited English Proficient (LEP)	38	34	38	21	131
Dual Eligible	147	146	148	75	516
Medicare Status Due to Disability	82	72	85	53	292
Dual Eligible due to Mental Disability	3	11	19	10	43
Applying/Receiving Social Security/Medicare Disability	104	95	94	66	359
<b>Age</b>					
Under 60	54	57	60	31	202
60-64	23	26	30	22	101
65-74	129	140	173	90	532
75-84	52	71	62	38	223
85+	21	26	32	19	98
Not Collected	2	3	4	1	10
<b>Marital Status</b>					
Married	109	130	135	60	434
Never Married	29	34	38	19	120
Separated	4	9	10	9	32
Divorced	55	65	76	50	246
Widowed	65	66	78	42	251
Domestic Partner	0	1	0	0	1
Not Collected	19	18	24	21	82
<b>Estimated Financial Saving</b>					
Clients with Financial Savings	108	83	124	76	391
Estimated Dollars Saved	\$483,877.86	\$227,082.85	\$359,837.64	\$391,802.74	\$1,462,601.09

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Topics/Needs Discussed					
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Medicare Parts A&B (Original Medicare)					
Enrollment/Eligibility/Screening	277	320	357	195	1,149
Benefit Comparisons/Explanation/Coverge Changes	141	206	263	120	730
Appeals/Grievances	0	3	0	0	3
Billings/Claims	14	11	7	4	36
Fraud/Abuse	40	233	344	191	808
Quality of Care	0	0	1	1	2
LTC/LTCI					
Enrollment/Eligibility Assistance	3	0	4	3	10
Billings/Claims	0	0	0	1	1
LTC Partnership	0	0	1	0	1
Appeal/Greivances	0	0	0	0	0
Fraud/Abuse	0	0	1	0	1
Other LTC	0	0	2	2	4
Medigap/Supplement/SELECT					
Enrollment/Eligibility/Screening	57	75	75	23	230
Benefit Explanation	54	59	58	24	195
Appeals/Grievances	0	0	0	0	0
Billings/Claims	0	2	0	1	3
Fraud/Abuse	0	0	0	1	1
Disenrollment/Coverage Changes	10	6	4	1	21
Quality of Care	0	0	1	0	1
Plan Comparison	8	1	4	3	16
Marketing/Sales Complaints/Issues	0	0	0	0	0
Plan Non Renewal	1	1	1	0	3
Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)					
Eligibility/Screening	75	92	107	44	318
Benefit Explanation	65	83	103	46	297
Appeals/Grievances	0	1	3	0	4
Billings/Claims	4	2	2	3	11
Fraud/Abuse	1	0	0	0	1
Coverage Changes/Disenrollment	15	8	14	3	40
Plan Non Renewal	2	1	4	2	9
Plan Comparison	8	10	20	16	54
Enrollment/Enrollment Asistance	1	0	10	3	14
Quality of Care	0	0	0	0	0
Marketing/Sales Complaints or Issues	0	0	0	0	0
Medi-Cal					
Medi-Cal Screening (SSI, Nursing Home)	54	57	74	31	216
Medi-Cal Application Assistance	36	38	45	47	166



From: 07/01/2011 To: 06/30/2012

	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
MSP Screening (QMB, SLMB, Q-1)	67	94	121	70	352
MSP Application Assistance	6	9	18	13	46
Medi-Cal/QMB Claims	3	9	16	13	41
Fraud/Abuse	1	1	5	5	12
Other	37	18	7	5	67
<b>Other</b>					
Employer/Federal Health Benefits (FEHB)	13	21	9	7	50
Military Benefits	8	5	8	0	21
COBRA	3	6	0	0	9
Mental Health Topics	2	2	3	0	7
Fraud/Abuse	1	0	0	2	3
Other Health Insurance	8	4	5	0	17
Other	1	1	3	1	6
<b>Part D - Medicare Prescription Drug Coverage</b>					
Benefit Explanation	131	225	254	90	700
Eligibility/Screening	119	183	220	73	595
Plan Comparison	79	143	174	58	454
Enrollment/Anrollment Assistance	23	45	70	19	157
Billings/Claims	5	1	2	0	8
Coverage Changes	24	54	61	9	148
Re-enrollment	1	0	2	0	3
Disenrollment	1	1	2	0	4
TROOP	4	0	1	0	5
Other	2	3	1	3	9
<b>LIS / Extra Help</b>					
Eligibility / Screening	82	84	136	55	357
Benefit Explanation	40	42	85	41	208
Application Assistance	18	24	45	23	110
Claims/Billings	0	1	0	0	1
Appeals / Grievances	0	0	0	0	0
<b>Other Prescription Drug CoveragePlans</b>					
Union/employer	3	5	0	1	9
PPARx	7	3	3	0	13
Military Drug Benefit	2	2	2	0	6
Manufacturer Program	2	1	2	0	5
Other	0	2	2	0	4
<b>Part D Plan Problems</b>					
<b>(Non-Compliance Services Unmet)</b>					
Eligibility	10	10	9	4	33
Lag Time	0	2	0	0	2
Multiple Enrollment	0	1	0	0	1
Poor Training of Agents	0	0	0	0	0
Poor Training of CSR	0	0	0	0	0

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	Topics/Needs Discussed				
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Fraud/Abuse	0	0	0	0	0
Marketing Fraud/Abuse	0	0	0	0	0
Agent fraud/abuse	0	0	0	0	0
Formulary problems/changes	1	2	3	0	6
Dosage problem	0	0	0	0	0
Data problems	3	1	0	0	4
Delay in medications	0	1	2	0	3
Incorrect Co-Pay/Can't Afford Co-Pay	0	2	1	1	4
Client reached donut hole	4	3	7	1	15
SSA Premium withheld	0	0	0	0	0
Appeals/Grievances	0	0	1	0	1
Quality of Care	0	0	0	0	0
Plan Non Renewal	0	0	0	0	0
<b>HICAP Legal Services</b>					
Referrals to HICAP Legal	0	0	0	0	0
Legal Clients Served	0	0	0	0	0
Cases Opened	0	0	0	0	0
Cases Closed	0	0	0	0	0
Favorable Closed Case Results	0	0	0	0	0
Client Representation Hours	0	0	0	0	0
Consultation to Program Hours	0	0	0	0	0
HICAP Legal Clients that Saved	0	0	0	0	0
Estimated Financial Savings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

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### Complaints Filed

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
<b>Medicare Part D Complaints Filed</b>					
CDI:	0	0	0	0	<b>0</b>
CMS:	0	2	0	0	<b>2</b>
Part D Plan:	0	0	0	0	<b>0</b>
SMP:	0	0	0	0	<b>0</b>
Urgent Fax:	0	0	0	0	<b>0</b>
800 Medicare:	0	0	0	0	<b>0</b>
Other:	1	1	7	3	<b>12</b>
<b>TOTAL MEDICARE PART D COMPLAINTS</b>	<b>1</b>	<b>3</b>	<b>7</b>	<b>3</b>	<b>14</b>
 <b>All Other Complaints</b>					
APS :	0	0	0	0	<b>0</b>
CDI:	0	0	0	0	<b>0</b>
CMS:	0	0	0	0	<b>0</b>
QIO:	0	0	0	0	<b>0</b>
SMP:	0	0	0	0	<b>0</b>
Other:	0	0	0	0	<b>0</b>
<b>TOTAL ALL OTHER COMPLAINTS</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
 <b>800 Medicare Line Issues</b>					
Total number of Calls with Issues	0	1	3	1	<b>5</b>
Total duration of calls	0.00	0.00	0.00	0.00	<b>0.00</b>